

Release Date: July 23, 2018

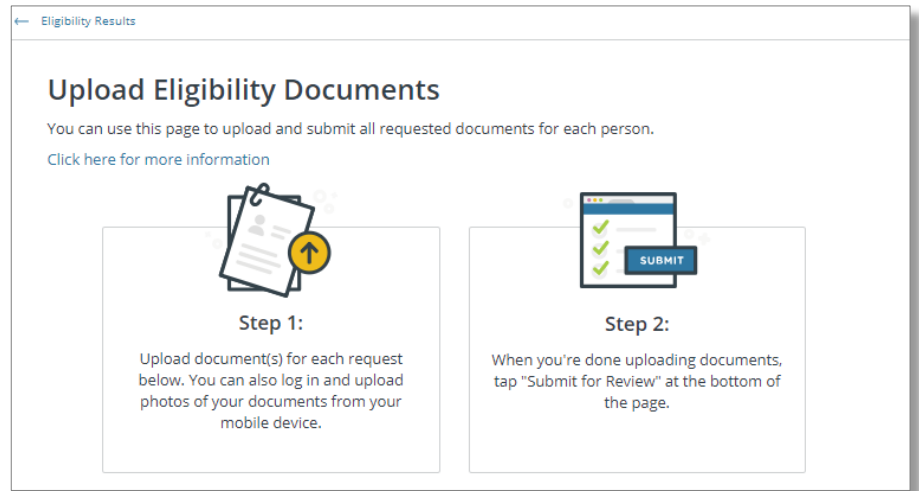
CalHEERS will be updated to version 18.7 on July 23, 2018. These Release Notes are intended to inform you of the important changes occurring in CalHEERS with this release.

Redesigned Eligibility Document Upload Pages

Covered California consumers in a conditional eligibility status receive a reminder notice from Covered California that informs them they need to provide documents to prove they are eligible to continue their health insurance and/or financial assistance through Covered California.

The current Manage Verifications page has been redesigned to improve the experience for the consumer:

- Page renamed to Upload Eligibility Documents
- Improved instructions to guide consumer
- New uploading functionality allows for multiple documents, as well as one file with multiple verifications



Update to Household Re-Rating Rules

This release implements new rules for households reporting a change. Following CalHEERS Release 18.7, households will or will not be re-rated based on new criteria.

The chart below outlines scenarios that demonstrate new logic and how it impacts certain changes reported.

Households <u>will no longer</u> be re-rated when:	Household <u>will be</u> re-rated when:
<ul style="list-style-type: none"> The consumer selects the same plan, but the change reported changes the CSR tier within a silver product with no subscriber change <ul style="list-style-type: none"> Example: Silver 94 to Silver 73 	<ul style="list-style-type: none"> The household moves to a new rating region, but stays with the same carrier – they will be re-rated to their new region, but not to any birthday's that have occurred <ul style="list-style-type: none"> Example: Mom-30, Dad-29, Baby-5 move to a new region (mom had a birthday since initial enrollment) – they will only be re-rated to new region/zip code, NOT mom's birthday (age)
<ul style="list-style-type: none"> The consumer selects the same plan and no subscriber change <ul style="list-style-type: none"> Example: Gold 80 to same Gold 80 	<ul style="list-style-type: none"> The consumer selects a new plan or metal tier or carrier <ul style="list-style-type: none"> Example: Silver 70 to Gold 80 Example: Kaiser to Blue Shield
	<ul style="list-style-type: none"> The subscriber changes in the enrollment <ul style="list-style-type: none"> Example: Primary Contact is no longer covered

Premium Tax Credits to be Prorated

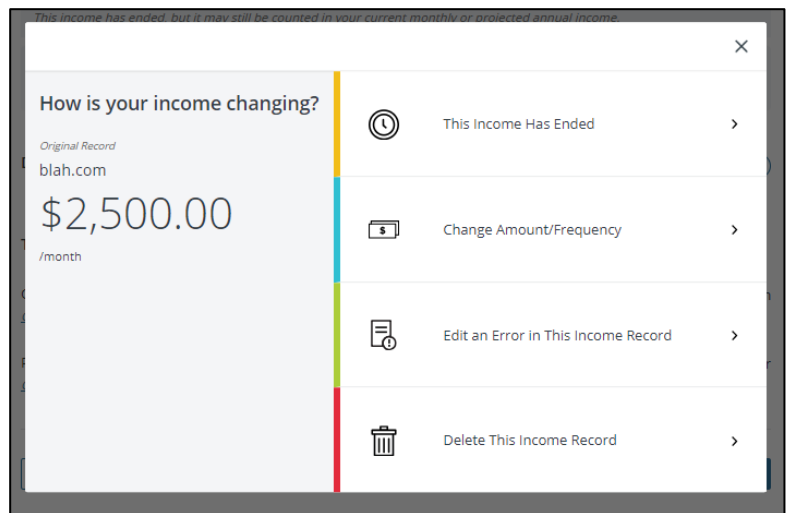
Prior to this release, CalHEERS did not prorate APTC for any partial-month changes to health plans, creating a potential mismatch of information between CalHEERS and the carriers. Now, Tax Credits will be prorated on a daily basis for any partial-month changes to health plans.

Edit Income Section Update

Modifications have been made so that when consumers change their income, the system now asks users to provide the reason for the change. This new functionality will assist the consumer in keeping accurate track of the income for tax purposes. In addition to showing current income and deduction records, this will now show records that have ended or are no longer active.

The following sections have been updated in the Edit Income section of the application:

- **Income History:** Lists income and deduction records that have ended or are no longer active.
- Clicking on the “Edit” button will display the Edit Income Reason popup (shown to the right), allowing consumers to edit information of their choice.
- New description within the Edit Income Amount popup: “If Income from this job changes month-to-month, enter what you expect [Household Member Name] to make. You can enter average income per month or estimate income for a full year.”



Note: Deleted income or deduction records will not show up in Income History for the duration of the Report a Change. Please refer to submitted application PDFs within the **View Case** window for a complete history.

Agency Portal Enhancements

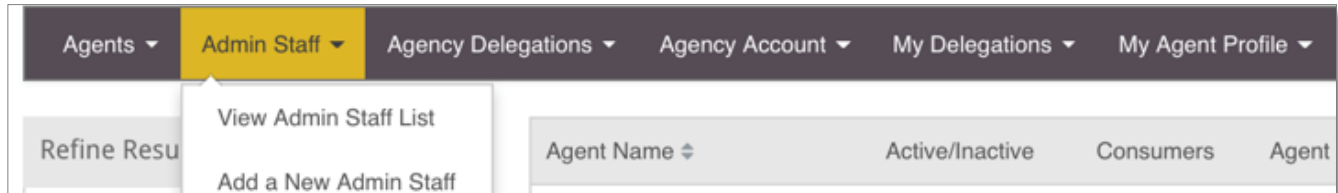
Additional enhancements to the Agency Portal are being implemented with this release. A new role has been added to assist with administrative functions and consumer support. This new role, Admin Staff, will have many of the privileges of the Agency Manager, such as transferring delegations within the agency, assisting consumers with filling out their application, and uploading documents. This role is NOT given the rights to plan select because Admin Staff are not licensed insurance agents. Admin Staff must complete Covered California’s online training and pass the background and fingerprint process to become Approved.

There are two levels of responsibility for Approved Admin Staff:

- **Level 1** – Have the ability to begin new consumer applications on behalf of an agent within the agency, report changes to existing applications within the agency, and contact the Agent Service Center on behalf of the agency. **Approved Admin Staff will not have access to plan selection.**
- **Level 2** – Will have the privileges of Level 1, with the additional functionality needed to manage the day to day functions of the agency, including adding new agents and transferring consumer delegation within the

agency. **Level 2 staff will not have the ability to transfer consumer delegations outside of an agency OR export an agent or agency Book of Business.**

Agency Managers add staff to the portal using the new tab on the dashboard. See [Add Admin Staff to Agency Job Aid](#) for additional information.



Delegation Code Display: An additional change to the Agency Portal is the addition of the Delegation Code. Prior to this release, when an Agent was onboarded, they receive a notice that provides their delegation code. This code is required to create an Account in CalHEERS. With this release, the Agent and Admin Staff delegation codes will also appear in the Agency Portal.

Correspondence Address: Agency Managers can no longer edit the Correspondence address for Agents. This must be done via the Agent admin team at Agentcontracts@covered.ca.gov

